Chapter 6: Data Entry

The SEER*DMS import feature provides access to data entry screens that allow you to enter data using the keyboard. This feature is typically used to key in data from paper forms. You may also use this feature to manually create records based on images of scanned documents (referred to as "image files" in SEER*DMS). However, image files are typically imported rather than manually attached to a record in a data entry session. When an image file is imported, SEER*DMS automatically attaches the image to an "empty" record and creates a manual Image Data Entry task that enables the user to enter data in critical fields. Please refer to *Chapter 5: Importing Data Files* for instructions related to image files.

A record created via data entry is forwarded into the workflow processes designated for its record type, following the same path as if it were loaded from a data file. However, in many registries, Review Flags may be set during data entry but cannot be set in data stored in a file. If the person performing data entry sets a Review Flag to "reviewed", edits associated with the flag will not trigger a Resolve Record Errors task when the record moves forward in the workflow. Registry managers must define standard operating procedures for those who manually enter new data; and must evaluate edits applied to record data.

In this chapter, you'll learn about

- Starting a Data Entry Session
- Using the Record Editor
- Entering Values for the Data Fields
- Keyboard Functions for Data Entry
- Printing a Record in SEER*DMS
- Clearing Unsaved Data
- Reports Related to Data Imports

Starting a Data Entry Session

Requires system permission: *import_manual* and *contact_view*

You may enter a set of records from the same source facility during a single data entry session.

To start a data entry session:

1. Select **System** > **Import**.

2. Click **New Import**.

3. Use the lookup for the **Contact (Facility)** field to specify the person who provided the data. If the person is affiliated with more than one organization, select the appropriate facility for this import. Contacts and facilities are described in *Chapter 19: The Contact List* and *Chapter 18: The Organization and Facility List*.

4. To key data printed on a paper form, set the **Media Type** to *Paper Documents*. To manually create a record based on an image file, select *Image Files*.

5. Enter the **Reference/Barcode** if applicable for this import.

6. If your registry tracks sent and received dates separately, enter a value for **Sent Date** as dictated by your registry's policy.

7. **Received Date** is automatically set to today's date. You may modify this value if the file(s) actually arrived at the registry on a previous date.

8. You may enter notes regarding the import in the **Comments** field.

9. Click **Next**.

Follow the instructions in the *Using the Record Editor* section of this chapter to complete the data entry session. As each record is saved, SEER*DMS will assign a unique record ID and forward the record to the initial processing tasks in the workflow.

Using the Record Editor

After initiating the data entry session as described in the previous section, SEER*DMS will display a record editor similar to the one shown below.

Use the links in the **Record Navigation Box** to access each page of record data. The number of pages and the layout of the fields in the body of each page vary by record type.

The following items are displayed in the **Info Box** during a data entry session:

- **Import ID** – A unique identifier assigned to all records entered in the same data entry session or imported in the same set of files. An Import ID will be assigned when you complete the data entry session. The Import ID can be used to generate reports regarding the records entered during a data entry session (see *Reports Related to Data Imports*).
- **File Type** – This field is only relevant for records imported from data files. This field is not applicable to records entered via data entry or records migrated into SEER*DMS when the

system was first deployed. If *N/A* is displayed for file type, the first entry of the Audit Log can be used to determine whether the record was entered manually or migrated.

- **Source** – The facility specified as the source of the data.
- **Record Type** – A drop-down list of the types of records that can be entered manually.

The **body** of the record editor displays the content for the currently selected page. The layout of the fields in the body of the page varies by record type. The NAACCR record type is consistent in all registry configurations, other record types vary.   A variety of controls are used on the data pages to edit specific fields; these are described in the *Entering Values for the Data Fields* section of this chapter.

Entering Values for the Data Fields

Requires system permission: *import_manual* and *contact_view*

To enter values for the data fields:

1. Select the appropriate **Record Type** from the drop-down list provided in the **Info** box on the left side of the screen.

2. The editor displays data fields in different colors to highlight fields that generated an error based on SEER and local edits. At this point, errors may be indicated for missing data fields. You should limit your attention to entering the raw data provided on the paper records; errors should be addressed during visual editing tasks. *Chapter 7: Edit Errors* contains more information on the edits and the color codes used in the record editor.

3. Enter values for all data fields provided on the paper record:

    a. Enter data into the fields on the current page. You may use your mouse or keyboard controls to move from field to field. The cursor may be difficult to see when it is the first character in a data entry box.   Therefore, the field in which the cursor is currently located will be highlighted in green.

    b. You may enter text directly into fields; for some fields you may use a lookup 💡 to select a value from a list. See the *Keyboard Functions for Data Entry* section of this chapter for more information.

    c. If entering data for a record with multiple pages, use the links in the Record Navigation Box to move between pages.

    d. If the paper record does not provide a value for a field, leave the field blank.

4. If you mistakenly enter data for a record that you do not want to save, you may clear the data entry pages. For instance, you may use this feature if you realize that you are entering data for a record that you previously entered. Refer to the *Clearing Unsaved Data* section of this chapter for instructions.

5. Click **Save** when you have entered all available data for the record.

6. Enter **Comments** regarding the data entry session, if appropriate. Your comments will be accessible on this record's Audit Log page in all subsequent tasks.

7. Click **Save & Next** to complete data entry for this record. A record ID will be assigned and displayed at the top of the page.

8. Enter data for the next record on the blank data entry screen that is displayed. Repeat data entry steps until all records are entered. You may enter data for different record types during a single data entry session.

9. After the last record has been entered and saved, click **Cancel** to end the data entry session.

Keyboard Functions for Data Entry

The table below lists keyboard functions that can be used to modify fields in the editor.

Use your mouse to go directly to a field or use the following keystrokes:	
Use	**To**
Tab	Go to the next field
Shift + Tab	Go to the previous field

| To edit a data field, type the new value into the text box or use the following controls:	
Use	**To**
Click 💡	Open a lookup table to select a value from a list of the field's valid values. For some lookups, you will also be able to define new values (e.g., add a new physician or facility).
Ctrl + C	Copy to clipboard
Ctrl + V	Paste from clipboard to cursor location
Ctrl + X	Cut – deletes highlighted text and copies it to the clipboard
Ctrl + A	Select all text (highlight without using the mouse)
Home and End	Go to beginning or end of current field

Printing a Record in SEER*DMS

Requires system permission: *import_manual* or *rec_read_only* or *rec_edit*

Use the print feature to create a PDF report showing the current entries for all data fields. The report will include fields from all pages of the record. You may print a record during a data entry session, when a record is opened in the editor during a worklist task, or when an unlinked record is opened from the Patient Lookup. You may also print a linked record when it is viewed in the patient set editor.

To print a record:

1. Click the ▫ menu indicator in the Record Navigation Box to open the record menu:
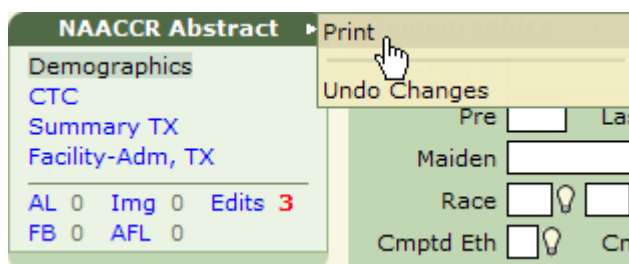
2. Select **Print** to create and open a PDF file.

3. Use the Adobe controls to save or print the report.

4. Close the Adobe window.

Clearing Unsaved Data

Requires system permission: *import_manual*

If you have mistakenly entered data for a record that you do not want to save, use the undo feature to clear the data entry pages. You may use this feature if you realize that you are entering data for a record that you previously entered.

To clear unsaved data:

1. Click the ▫ menu indicator in the Record Navigation Box to open the record menu:
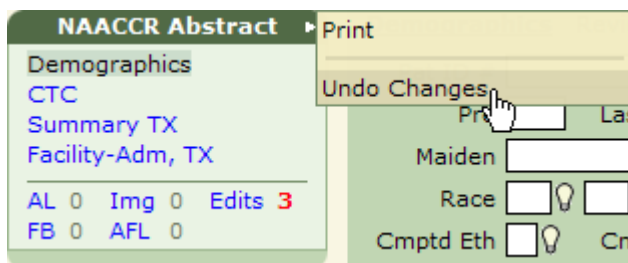
2. Select **Undo Changes**.

Reports Related to Data Imports

In SEER*DMS, a data entry session is considered to be a single, manual import. Therefore, each record saved during a data entry session is assigned the same Import ID. The Import ID can be used to generate reports regarding imported data files or data entry sessions. System reports related to data imports are listed in the table below. If you require additional information regarding imported data, you may query the database using the record's Import ID or Date Loaded; or query fields stored in the *Submission_file* table. See *Chapter 24: Creating Reports and Extracting Data* for further instructions; refer to the *SEER*DMS Data Dictionary* for information related to the database tables.

Report ID	Title	Description
RPT-009A	Imported Records	A list of records in a specific import or a listing of records imported on a specific date.
RPT-015A	Record Counts by Abstractor	Counts of initial, follow-up and casefinding records by abstractor (as designated in the abstracted_by data field).
RPT-061A	Workflow Location of Imported Records	For each imported record, this report lists the current location of the record in the workflow.
RPT-070A	Import Summary	Filenames, number of records, and comments for imports in a specified time period.